



COUNTY OF PLACER
ADMINISTRATIVE SERVICES DEPARTMENT
CLARK L. MOOTS
Director of Administrative Services
Procurement Services Division
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August 29, 2006

RFP No. 9613
Countywide Document Management System
Addendum No. 1

A pre-proposal conference was held on August 25, 2006. Attendees posed numerous questions, some of which were answered at the conference, and some of which required further research. Because the responses may be beneficial to all prospective proposers, the answers are hereby provided as an addendum. In cases where this addendum may conflict with the original RFP, this addendum shall prevail.

	QUESTION	ANSWER
1.	Section 6.0 - please clarify the number of users for each application. The table in this section only lists the number of users per department, but does not indicate which applications these persons use.	<ul style="list-style-type: none">• The pilot departments for this project will be the Community Development Resource Agency (consisting of Building, Planning, and Engineering/Surveying), and the Environmental Health division of HHS.• The other departments mentioned in this RFP will be implemented at a future date, as time and budget allow.• The user counts shown in Section 6.0 show the number or <u>concurrent</u> licenses required (77 for CDRA, and 43 for Environmental Health). Your proposal should include pricing for this initial number of concurrent licenses. Future licenses for the remainder of these departments should be quoted as a "per seat" price, or per batch or seats, whichever is normally quoted for your product.• The estimated amount of stored images required by CDRA and Environmental Health are shown in Section 6.0• <i>Additional pricing is requested for scanning archived documents for CDRA: Approx. 400,000 pages of 8.5x11 and 8.5x14 Approx. 100,000 pages of D-size maps, 11x17 documents, and photographs Exhibit F has been amended to request this additional pricing.</i>
2.	Section 4.1 lists a number of applications that must be interfaced prior to "go live". Some of these same applications are listed in 3.10 as "may also be required". Please clarify.	
3.	Section 6.0 – Image count Please clarify the requirements for current and projected image counts.	

	QUESTION	ANSWER
4.	Describe the County's requirements for migrating existing data from the AtPac system	After the implementation of CDRA requirements as mentioned above, the County will consider the rollout of the remaining requirements on a schedule yet to be determined. Data migration requirements would be further discussed at that time.
5.	Clarify the County's desire for the pricing structure for the licensing (a single lump for all licenses required, current and future, or unit price per license, or ?)	Please provide pricing for the initial number of licenses required for the CDRA "pilot" group. Price additional licenses for future purchase in a "modular" format.
6.	Please clarify the County's desired rollout plan for the initial "go live" and the rollout.	Yet to be determined; see above.
7.	The current project schedule appears to be very aggressive for what seems to be a large work effort. Please clarify and/or modify.	The project schedule published in the RFP is based on our best estimate of the time required to implement CDRA's requirements.
8.	Regarding integration requirements: Does the County wish to import the scanned images into the database(s), or scan the documents using OCR and import the data into the appropriate tables (such as import building permit info into the Kiva permit system)?	The County has no preconceived idea of what is the most effective way of integrating the scanned data for efficient retrieval by users. Proposers should offer the most practical and effective option they can, based on their own experience and capabilities..
9.	Does the County prefer to award to a firm who has existing experience in supporting the County's current applications?	Not necessarily; proposers should describe their ability to integrate the scanned information from the Document Management System into systems similar to those in use at Placer County.
10.	Did the County use a consultant to develop the scope of work and other requirements contained in this RFP?	No – all of the information was developed by County staff.
11.	Although the awarded firm will not be providing the required hardware for this system, please elaborate on the County's hardware requirements.	<p>The County has a 3-year replacement plan for all network hardware. However, the software provided by the successful should remain viable for a much longer period, up to 10 years or more, if possible.</p> <p>Please note, the County will purchase <u>all</u> hardware required for this project, including servers, scanners, network components, etc.</p>
12.	Exhibit D1 – Item 3.09 – What sort of items would need ICR imaging (optical handwriting recognition)?	Examples include voter registration cards or building permits. These are forms that the public typically completes by hand and must bear their original signature.
13.	Exhibit D1 – Item 4.0 – Would the County consider a third party solution for this?	Yes, provided it is integrated with the vendor's own software solution.
14.	Exhibit D1 – Items 5.02 and 9.04 seem to conflict.	Some documents should allow editing, providing there are not overriding legal restrictions which require the County to maintain exact and true copies of the originals (such as voter registrations, birth/death certificates, etc.).

	QUESTION	ANSWER
15.	Exhibit D1 – Item 10.02 – Describe the County’s requirement for utilizing XML	The intent of this requirement is to provide public access to records using current industry standards, using widely-available software, browsers, etc.
16.	Exhibit D1 – Item 11.01 – Please elaborate on the requirement for integration with KIVA.	At minimum, the County would like to have the image scanned into the Document Management System, then linked to KIVA via appropriate keys.
17.	Exhibit D1 – Item 11.03 – Please elaborate on the requirement for integration with PAS	It is desired that certain financial management reports, which are generated by Crystal, would be scanned and loaded into the Document Management System. Please note this is a FUTURE requirement, and will not be a part of the initial project.
18.	Would the County consider proposals to redesign existing forms to make scanning and integration more efficient?	Yes, provided the changes don’t conflict with state or federal regulations for information capturing and storage.
19.	Describe the County’s current practice for database management? What are the County’s future plans?	The County’s centralized IT Division, under Administrative Services, maintains the Countywide network, core security, and most servers. IT also provides DB administration, data backup, disaster recovery, and help desk services for most of the databases which are used by more than one department. Functional maintenance and support for these system is provided by the responsible department. The Health & Human Services Department has their own VPN that contains databases that are fully maintained and supported by HHS staff or are otherwise integrated with Statewide systems. The County is not currently entertaining any deviation from these current arrangements.
20.	Would the County consider a business process review during the implementation of this project that would include document management, approval, etc.?	Yes, although there are some current systems that already utilize workflow processes that the County does not wish to replace. (Example: Board of Supervisors’ agenda development system)
21.	Does the County desire an enterprise-wide solution which is a single repository of all images, controlled by security access? OR Individual repositories for the images stored and retrieved by each department or workgroup?	The solution must be mindful of the fact that certain records must be maintained in a highly secure manner due to public safety, HIPAA, and other security requirements. For this reason, individual repositories would be desirable, but the County’s would consider a single storage area, providing the system had a well-designed security system.
22.	What are the County’s preferences for minimizing downtime and maintaining high availability.	The County is currently utilizing a SAN system for the HP-UX servers, disk mirroring, nightly backup, and some data storage redundancy. Proposers should make recommendations for based on what they believe are the best practices for maintaining availability of the new Document Management System.

	QUESTION	ANSWER
23.	What are the County's desires for record retention and destruction within the Document Management System? Should the system have the capability of destroying documents that are no longer desired/required?	The County currently has a formal record retention policy for the hard-copy documents it stores in its archives. The retention and destruction of images in the Document Management System will follow this policy. <i>See Procurement Services' website for a complete copy of this policy.</i>
24.	Section 4.2.9 E. – What is the "CUBS" system that the Revenue Services Division uses?	This is a revenue collecting system designed by Columbia Ultimate Business Systems (CUBS).
25.	Does the County have a desire to use the new Document Management System for storing video files, DVDs, audio files or other formats?	For now, the County's goal is to scan and/or store images of scanned hard-copy documents, plus Word files, Excel files, emails, and other electronic files. It would be desirable if the proposed system could accommodate additional formats, but the County is not prepared to undertake that effort at this time.
26.	Does the County prefer a client/server solution or are other solutions acceptable?	No preference. The County is seeking the best and most appropriate technical solution.
27.	Does the County have a specific project methodology in mind?	Vendors should propose the methodology that they feel is appropriate to complete the project successfully. Common tools normally include the use of GANTT charts and MS Project, but the County will consider other methodologies which the vendor feels is effective.
28.	Why is the County choosing not to develop the current AtPac CRiiS system?	The new system will be more broadly utilized by County departments and the public, and will contain document management and workflow functionality as well as a much larger database, and will ultimately be integrated with a wide variety of other databases in use throughout the County. While the current system is effective for its current use, it is the intent of this RFP to search the current marketplace for the system which best fits the County's expanded needs. All interested firms, including AtPac, are welcome to submit proposals.
29.	What is the budget for this project? Funding source?	The County will develop a budget and secure the appropriate funding based on the cost of the system offered by the selected firm.
30.	Please provide Exhibits E and F in a Word document or format which enables the responding firms to complete the forms electronically.	<i>See Procurement Services' website for fillable versions of these forms.</i>

The deadline for submitting proposals has been extended to:

September 22, 2006 – 5:00 pm

With the exception of the above noted items, all other requirements, terms, and conditions of this RFP remain in full force and effect.

Formal acknowledgement of this addendum is not necessary; however, your proposal shall consider and/or address the issues addressed herein.

If you have submitted questions at the pre-proposal conference or by other means, and you don't find your questions answered here, please contact the person named below immediately.

Direct all questions regarding this RFP to:

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